Zoom Event Best Practices

**Introduction: Stages of Event Support** – To make the logistics of running Zoom events more manageable, we have broken the process into five distinct stages. Those stages are:

* Event Planning
* Event Rehearsal
* Pre-Event Warmup
* Event Support
* Post-Event Support

In each stage we lay out required tasks and provide best practices. Other documents may be referenced, and links to Zoom’s knowledge base will be included if the information is subject to change.

**Event Planning** – The Event Planning is the longest and most important stage in the event process. It encompasses everything from the initial request for support until the day of the event. Think of this time as the foundation of your event; without a strong foundation your meeting or webinar can crumble in front of you.

## Event Kickoff Meeting

* This meeting should include as many key stakeholders as possible. At the very least you will need the meeting coordinator and the lead technical resource, but you also can include the executive sponsor, moderators, panelists, and additional support staff.
* Start by getting the big picture. You need to understand the vision for the meeting to begin planning. Sometimes this means getting the stakeholders to agree on that vision first.
* Once you have the overall vision, lay out the resource requirements. You might not need to dig into the technical details, but you will want to confirm that you have access to everything that you need. If you don’t have what you will need to achieve their vision, you will want to discuss the necessary costs (time or financial) or how they need to modify the scope of the project. Some things to think about:
	+ Are we using the right platform?
	+ Do we have the correct licenses?
	+ Do we have access to the correct equipment?
	+ What physical spaces will we need?
	+ Will we need more support resources—either technical or non-technical?
* Gather additional details and start filling out the Event-Planning Checklist.
* Assign tasks and due dates. Make sure that you set give yourself enough time between the due date and the event. For example, you might want all presentation materials in at 3pm the day before, so you aren’t testing PowerPoints at night or early in the morning.

## Fill out Event-Planning Checklist

* The Event-Planning Checklist will help you gather the basic information that you will need to create the meeting or webinar. We recommend filling this out during the Kickoff Meeting and updating it as needed. [See “Event-Planning Checklist” document]

## Schedule Event and Practice Sessions

* Create the Zoom meeting or webinar for the event in the Zoom online portal. [See [Scheduling Meetings](https://support.zoom.us/hc/en-us/articles/201362413-Scheduling-meetings), [Scheduling a Webinar without Registration,](https://support.zoom.us/hc/en-us/articles/204619235-Scheduling-a-Registrationless-Webinar) and [Scheduling a Webinar with Registration.](https://support.zoom.us/hc/en-us/articles/204619915)  Also, refer to the “Meetings and Webinars Best Practices” document for our settings recommendations.]
* Create the Zoom meeting or webinar for the practice session or sessions. We recommend creating a separate, but identical meeting/webinar for the practice sessions. This will allow your users to become familiar with the platform without impacting the actual event.
* Check the meeting/webinar host’s Zoom settings to confirm that the appropriate features are turned on for the user. [See the “Meetings and Webinars Best Practices” document]

## Gather Presentation Materials

* First, determine how materials will be presented during the meeting. The panelists can screenshare from their own devices, or all content can be driven by one device. Using a single device for content can give a smoother experience for the audience but requires more effort and coordination. We will often have a separate content laptop that can be controlled physically by a tech and grant remote access to the panelists during their presentation. [See [Requesting or Giving Remote Control](https://support.zoom.us/hc/en-us/articles/201362673-Requesting-or-giving-remote-control)]
* Create a shared folder through a service like OneDrive, Google Drive, or Box, and share the link with the meeting organizer and panelists. We recommend doing this even if they plan on sharing their own content just to be safe. Set the expectation that content needs to be uploaded well before the event to allow you time to download and check the presentations/videos. However, do not expect this to work and prepare to receive content the day of or even during the actual event.
* Download and test the content on the presentation PC. Check to make sure that videos are embedded and will play correctly. If you encounter the “Codec unavailable” error on Mac PowerPoint, try opening the file on a PC and running a compatibility check.
* We strongly recommend having each presentation file on at least two devices that are joined to the meeting and being prepared to share a backup if necessary.

## Create Run of Show

* Work with the event coordinator to create a run of show document with segment name, times, presentation title, panelists, roles, and notes. It is best to have this before the Event Rehearsal. [See “Example Run of Show” document]
* Depending on the production level of the event, a detailed script with might need to be created in addition to the run of show. This is needed if the speakers need to be spotlighted or if content needs to be shown at very specific times.
* Review the documents carefully before the event. Even if there is only one technician supporting the event, thinking through the more complex segments or transitions will make them smoother during the event.

## Add Polls/Breakout Rooms (optional)

* Add polls and breakout rooms to the Zoom meeting/webinar if appropriate. This can either be done by the meeting coordinator or the technician. [See the “Meetings and Webinars Best Practices” document]
* Discuss these features as early as possible—both can be complex and may require additional support personnel.

**Event Rehearsal** – The scope of the Event Rehearsal meeting can vary significantly between events. Some rehearsals will be short, and some will require more time than the event itself. However, we recommend always having some type of rehearsal meeting.

## Connect to Meeting/Webinar

* Have all the participants connect to the meeting or webinar. Joining a webinar as a panelist is slightly different than joining a regular meeting, so some users may have issues with this step. If possible, have the users join from the same location and using the same setup that they will for the actual event. It is highly encouraged to use a wired connection if possible.
* Check audio, video, and network for all users. Audio and video checks are more than just confirming the correct devices are working. Listen for legibility and check for background noise. Look for correct framing and lighting. Checking network connectivity is more difficult, but you can notice freezing, pixilation, and dropped audio. A more reliable way to check these stats in through the Zoom Dashboard. [See [Getting Started with Dashboard](https://support.zoom.us/hc/en-us/articles/204654719-Getting-started-with-Dashboard-) and [Dashboard for Meetings and Webinars](https://support.zoom.us/hc/en-us/articles/360039017432)]
* Some groups may choose to use matching virtual backgrounds. If this is the case, make sure that all users test this feature during the rehearsal. Not all devices support this feature, and users may get poor results if using a built-in camera or poor lighting. [See [System Requirements for Virtual Background](https://support.zoom.us/hc/en-us/articles/360043484511) and [Virtual Background](https://support.zoom.us/hc/en-us/articles/210707503-Virtual-Background)]

## Practice the Presentation

* This area can vary widely from event to event. At the very least, walk through the run of show and practice each feature (screensharing, polls, breakout rooms) that you will be using during the event. It may be helpful to have another tech or another device come into the meeting as an attendee, so you can demonstrate the audience view.
* Most issues occur during transitions, so spend extra time on them. Make sure that everyone understands how the transition is supposed to flow—who is speaking next, when they will start speaking, what content should be up on the screen. Practice the ending as well. The last thing that you want to do is end the meeting when the speaker is still talking.

**Pre-Event Warmup** – The Pre-Event Warmup is the time right before the event is scheduled to begin. Depending on complexity, this might be 15 minutes, or it may take more than an hour. Use this time to fix any technical issues or make last minute tweaks to the run of show. It is also helpful for the presenters to have dedicated time blocked out, so they are not interrupted right before the event.

## Final Audio/Video Check

* Run a quick audio and video check on each participant as they join the meeting. Even if they were fine in the rehearsal, they may still have issues. You may also have to help with virtual backgrounds or other last-minute feature walkthroughs.
* This is also a good time to remind the presenters to turn off notifications and close any unnecessary programs. If this is a longer event, some presenters may want to work or check emails when they aren’t speaking. If they choose to do this, they should turn off their camera. The audience can normally tell when they aren’t paying attention.

## Prepare Content Share

* Before anyone else jumps on, open all presentation content, and have the first piece pulled up and ready to share. Make sure that you know when you will need to share computer audio or optimize for video.
* If you are using a separate content device, have a backup version of the content on your main device. We recommend having these files on the desktop in the order they will appear during the presentation. Some content, like intro videos, may be easier to share from your main device instead of a separate content device.

## Start Early (Optional, but recommended)

* Starting 3-5 minutes early will allow the audience members enough time to join the event and get settled before the first speaker. This is especially important if you are using a large webinar or are live streaming the event. It can take up to a minute for all webinar participants to be admitted or for the event to start on the streaming platform.
* During this time, we recommend playing an intro video. This video can include the event title, speaker bios, the agenda, housekeeping items, and information for upcoming events. Make sure that the video has sound. This will allow the audience to check their speakers and prevent the chat/Q&A box from being flooded with support questions.
* You can also designate a presenter or support member to send welcome and housekeeping messages in the chat. Since the audience members will only be able to see messages that are sent after they join the meeting, you will need to send several copies of the same message.
* Some events will run a poll during this time to drive audience engagement.

**Event Support** – The event support segment lasts from when you start the meeting/webinar until you chose to end it. The sections below will provide tips on supporting the event and resources for learning more about certain features.

## Tips for Event Support

* Learn the Zoom platform and its capabilities. You need to be comfortable with the software and know its capabilities to be effective. Review the resources below and check the [release notes](https://support.zoom.us/hc/en-us/sections/201214205-Release-Notes) for information on the latest features. Keep your Zoom application open and encourage other users to do the same.
* Use multiple devices and multiple monitors. A common setup that our technicians use is to have a main PC and a content PC in the call. Having a separate content PC allows the technician to have full control over their main PC without worrying about interrupting the presentation. Our techs will normally use two or three displays:
	+ Main Display – Zoom window in Gallery view with the Participant panel open
	+ Secondary Display – Zoom Chat and/or Q&A windows, 3rd-party chat application for communication with support team (MS Teams, Slack)
	+ Tertiary Display – Notes, some content (like videos or backup PowerPoints), breakout or polling windows, etc.
* Switch to Gallery view in order to see users who may be trying to speak with their mics muted. This will also help you more quickly respond if you need to turn off a participant’s video. (See [Changing the Video Layout](https://support.zoom.us/hc/en-us/articles/201362323-Changing-the-video-layout-Speaker-view-and-Gallery-view-))
* Have a backup method of communicating with your panelists outside of Zoom. Cell phones are the preferred option since they will work even if the other person loses power and internet.
* Macs are currently the only devices that can run the Zoom application multiple times. This can be important if you want to manage and record multiple breakout sessions with one technician.
* Double check that the meeting is being recorded, even if it was set to record automatically.
* Be aware of your own audio and video. You may need to need to speak during the meeting, and you want the audience to be able to hear you. (See [Testing Computer or Device Audio](https://support.zoom.us/hc/en-us/articles/201362283-Testing-computer-or-device-audio))
* Most presenters will rush through polls. You want to make sure that the audience has enough time to read, think about, and respond to each question. You may need to step in and tell the presenter that the audience is still answering the question.
* We recommend turning off chat for webinar participants and forcing them to use the Q&A feature. It is much easier to keep track of conversations in the Q&A box, and this frees up the chat for presenter/support communication. (See [Using In-Meeting Chat](https://support.zoom.us/hc/en-us/articles/203650445-Using-in-meeting-chat), [Controlling and Disabling In-Meeting Chat](https://support.zoom.us/hc/en-us/articles/115004809306-Controlling-and-disabling-in-meeting-chat), [Using Q&A as the Webinar Host](https://support.zoom.us/hc/en-us/articles/203686015-Using-Q-A-as-the-webinar-host))

## Learning Resources

* General Information
	+ [Zoom Live Training Webinars](https://support.zoom.us/hc/en-us/articles/360029527911-Live-training-webinars)
	+ [System Requirements for Windows, macOS, and Linux](https://support.zoom.us/hc/en-us/articles/201362023-System-requirements-for-Windows-macOS-and-Linux)
	+ [Roles in a Meeting](https://support.zoom.us/hc/en-us/articles/360040324512-Roles-in-a-meeting) & [Roles in a Webinar](https://support.zoom.us/hc/en-us/articles/360000252726-Roles-in-a-webinar)
	+ [Host and Co-Host Controls in a Meeting](https://support.zoom.us/hc/en-us/articles/201362603-Host-and-co-host-controls-in-a-meeting)
	+ [Time Limits for Idle Meetings](https://support.zoom.us/hc/en-us/articles/202460676-Time-limits-for-idle-meetings) – Please read. Don’t learn this the hard way.
* Core Features and Controls
	+ [Managing Participants in a Meeting](https://support.zoom.us/hc/en-us/articles/115005759423-Managing-participants-in-a-meeting) & [Managing Attendees and Panelists in a Webinar](https://support.zoom.us/hc/en-us/articles/115004834466-Managing-attendees-and-panelists-in-a-webinar)
	+ [Muting and Unmuting Participants in a Meeting](https://support.zoom.us/hc/en-us/articles/203435537-Muting-and-unmuting-participants-in-a-meeting)
	+ [Spotlighting Participants' Videos](https://support.zoom.us/hc/en-us/articles/201362653-Spotlighting-participants-videos)
	+ [Enabling and Adding a Co-Host](https://support.zoom.us/hc/en-us/articles/206330935-Enabling-and-adding-a-co-host)
	+ [Audio Echo In A Meeting](https://support.zoom.us/hc/en-us/articles/202050538-Audio-Echo-In-A-Meeting)
	+ [Push-to-Talk](https://support.zoom.us/hc/en-us/articles/360000510003-Push-to-talk)
	+ [Joining a Meeting or Webinar by Phone](https://support.zoom.us/hc/en-us/articles/201362663-Joining-a-meeting-or-webinar-by-phone)
	+ [Managing Breakout Rooms](https://support.zoom.us/hc/en-us/articles/206476313-Managing-Breakout-Rooms) & [Participating in Breakout Rooms](https://support.zoom.us/hc/en-us/articles/115005769646-Participating-in-breakout-rooms)
	+ [Polling for Meetings](https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-meetings)
	+ [Waiting Room](https://support.zoom.us/hc/en-us/articles/115000332726-Waiting-Room)
* Advanced Features and Controls
	+ [Advanced Desktop Client Settings](https://support.zoom.us/hc/en-us/articles/360037870291-Advanced-desktop-client-settings)
	+ [Joining Multiple Meetings Simultaneously on Desktop](https://support.zoom.us/hc/en-us/articles/360001120743-Joining-multiple-meetings-simultaneously-on-desktop)
	+ [Background Noise Suppression](https://support.zoom.us/hc/en-us/articles/360046244692-Background-noise-suppression)
	+ [Enabling Option to Preserve Original Sound](https://support.zoom.us/hc/en-us/articles/115003279466-Enabling-option-to-preserve-original-sound)
	+ [Allowing Removed Participants or Panelists to Rejoin](https://support.zoom.us/hc/en-us/articles/360021851371-Allowing-removed-participants-or-panelists-to-rejoin)
	+ [Language Interpretation in Meetings and Webinars](https://support.zoom.us/hc/en-us/articles/360034919791-Language-interpretation-in-meetings-and-webinars)
	+ [Pre-Assigning Participants to Breakout Rooms](https://support.zoom.us/hc/en-us/articles/360032752671-Pre-assigning-participants-to-breakout-rooms) – Adding this for reference. However, as of early 2021, this feature is still very broken. Please do not use without extensive testing.

**Post-Event Support** – There are multiple approaches to the post-event support stage, including not having one, but we’ve seen three major themes that are outlined below.

## Post-Event Review

* The first opportunity to debrief after an event is immediately after. We recommend scheduling some time, and a separate Zoom meeting if necessary, right after the event to get instant feedback. During this meeting you should assign any follow-up tasks like recording editing or written responses to questions if they weren’t discussed before the event.
* Some groups choose to have a more formal meeting, especially for large, high-profile events. We recommend scheduling this between a day and a week after the end of the event. This allows the group time to reflect on the meeting without going so long that they start to forget details.
* We also suggest that the technician takes time to reflect on the event as well. If there are multiple technicians supporting events, you should also share your thoughts with the group.

## Meeting/Webinar Reports

* Zoom can generate multiple types of reports for meetings and webinar. Most will not be available until 30 minutes after the meeting/webinar has ended. (See [Getting Started with Reports](https://support.zoom.us/hc/en-us/articles/201363213-Getting-started-with-reports) and [Generating Reports for Registration and Polling](https://support.zoom.us/hc/en-us/articles/216378603-Generating-reports-for-registration-and-polling))

## Recording Edits

* If the meeting was recorded, you will most likely want to make basic edits and post the recording on another platform. (See [Managing and Sharing Cloud Recordings](https://support.zoom.us/hc/en-us/articles/205347605-Managing-and-sharing-cloud-recordings) and [Finding and Viewing Local Recordings](https://support.zoom.us/hc/en-us/articles/206277393-Finding-and-viewing-local-recordings) to learn how to access the recordings)
* Note that there is an issue with Zoom recordings slowing down or crashing Adobe Premiere Pro. We have found that re-encoding the file using Adobe Media Encoder will fix the issue and allow for normal editing performance.